

CASE STUDY

Strategic Thinking & Planning Skill Development

CLIENT



CHALLENGE



Sales leaders and account managers were facing rapidly changing market conditions and increasingly complex customer value chains with decreasing access to decision makers.

NEEDS



- 1 Develop the ability to think, plan, and act strategically to successfully navigate their increasingly complex business landscape.
- 2 Create a common approach to thinking and planning for their business.
- 3 Make more trade-offs with their time, talent, and budget to effectively prioritize their activities and customer interactions.

SOLUTION



- **Assessed baseline strategic capabilities** by administering the **Strategic Quotient (SQ)** Assessment to measure the ability to think, plan, and act strategically.
- **Provided the following pre-work material:**
 - Strategy Survey to prime manager's thinking on the market, customers, competitors, and company.
 - Rich Horwath's Harvard Business Review article, "How to Become a Better Strategic Thinker."
 - Video: "What is Strategic Thinking?"
- **Designed and facilitated one-day in-person** strategic thinking and planning **workshops** for cohorts of 10-20 sales leaders.
- **Designed and facilitated two, four-hour virtual** strategic thinking and planning **workshops** for cohorts of 10-20 account managers.
- **Provided all participants with the STRATEGIC hardcover book and custom STRATEGIC workbook** to record insights and serve as a future reference piece.
- **Offered Strategy Espresso microlearnings** to provide a 3-5-minute refresher each week on key concepts and tools with a question to apply to their business.
- **Designed a Regional Director (RD) Coaching Guide** to help sales leaders leverage the program material with their direct reports to ensure a common language and approach to thinking and planning for the business.

23% INCREASE

in strategic capabilities 6 months post-program.



Multiple President's Club award winners have **attributed their success in part to their learnings from the Strategic Thinking & Planning Program.**

CLIENT COMMENTS



“ We have worked with Rich and the Strategic Thinking Institute for 15 years. We have searched high and low for other Strategy programs, and none come close to the content, expertise, and delivery that Rich brings. Beyond his workshops, he offers ongoing support/consultation, and he REALLY means it! Rich helped me to prepare a strategic plan to be delivered in front of hundreds of people and his coaching allowed me to show up at my best. You will not find better programs on Strategic Thinking anywhere. Rich is a true partner.

Alison Pulte, Director of Leadership Excellence



“ Thank you for the exceptional Strategic Planning and Account Management Training today! You are a remarkable presenter and have provided our team with valuable information, insights and resources. The feedback from the field reimbursement leadership team has been phenomenal! Thanks again, Rich!

Maggie Kapp, Field Reimbursement Trainer



“ Rich is a thought leader in the strategic thinking world and does an exceptional job elevating our account management professionals to think strategically. He is an asset to our learning curriculum for the leaders within our organization.

Yumeka Strother, AD, Account Management training



“ Rich helps our leaders hone their critical priorities into powerful strategies. We are very blessed to have Rich leading us through our strategic thinking and planning. He is our Strategy Whisperer.

Jorge Luna, Southwest Regional Director

“ Rich is a true professional who delivers energetic, impactful and practical workshops and seminars. Rich's Strategic Thinking program provides a framework that is easily understood and applied for immediate results.



Joe Palumbo, Senior People Partner



“ I wanted to thank you for the excellent virtual sessions on strategic thinking and planning over the past several months. This has been very helpful to me as I have been a leader for 17 years in pharma and was in a place where I needed this type of training experience to heighten my effectiveness. I have already implemented many tools you shared with us from our past sessions and look forward to working with more. Much appreciated!

Suzanne Hochman, Area Business Leader, Los Angeles/Hawaii



“ Rich, thanks for a great program on strategic planning and account management! The feedback from the team has been pouring in about how much they enjoyed the training, and the value this will add to them and their job as account managers on a daily basis moving forward. You presented it in a way that was simple and actionable. What was really awesome for me to see the very next day as I went into the field with an account manager is that she had printed out the Opportunity Matrix and was actively working on initiatives that would have the greatest impact on her business. Again, thanks for joining us this week and leading us through this program.

Michael B. O'Connor, National Director



“ I thought the Strategic Thinking & Planning session was spot on for what our team needed. It was a welcome “pause” from the day-to-day for our teams to think and focus on what’s most important. The 3A Strategic Thinking and Planning Framework that you walked us through was quite intuitive with lots of application and scalability. It was very evident how much the team enjoyed the framework and how to balance priorities and importantly to have a “plan”. Thank you again and let’s stay in touch.

Cristian Azcarate, Executive Director



“ I appreciate your workshops and coaching for our Novartis team on developing a Strategic Mindset. It was super helpful to not only reinforce some strategy basics (you must carve out time to think strategically and stop allowing day-to-day fires to hijack this time) but to also discover some good tools to make it easier to leverage strategic thinking (GOST and 3A Strategic Thinking Framework). Now to see if we can truly transform into StrategyMan or allow the Anti-Strategy Squad to keep us at status-quo!”

Scot Dyer, Executive Director, Trade-Specialty-GPO